Original Research

Masterestaurant analysis of *customer loyalty* 2026: repeat guests spend 67% more per order, and that single number reorders your budget

By **Diego F. Parra** · Updated 2026-09-10 · Marketing & Growth

QUICK VERDICT

Headline finding: existing customers spend on average 67% more per order than new ones, according to Restroworks (2025), and 81% of U.S. loyalty program members buy more frequently than non-members, per the Paytronix Annual Loyalty Report (2024). Customer loyalty is not a discount: it is the ticket-and-frequency multiplier that makes every dollar of acquisition cheaper.

Diego F. Parra reads those numbers this way: if you spend up to 10% of sales on marketing because the restaurant is new —the ceiling Toast documents for 2025— and never step down to the 3% to 6% band of an established operation once the repeat base exists, you pay twice for the same guest. The most repeated mistake is measuring loyalty by program sign-ups; the number that governs is the share of sales coming from people who already walked in once.

A Bogotá owner showed me his marketing dashboard in May: 9.2% of quarterly sales spent on paid media, two years after opening, with a points program holding 4,100 sign-ups and no report on what those sign-ups actually sold. That is the whole problem in one screen. Enrollment counts itself; repeat purchase has to be hunted down.

This analysis synthesizes public data from Paytronix, Restroworks, Toast, the National Restaurant Association, TouchBistro and LoyaltyPass published between 2024 and 2026, organized by operating segment —fast casual, full service and QSR, crossed with 1 location, 3 to 10 locations and multi-unit— to answer a question few operators run with numbers: how much of your revenue depends on people who already know you.

There is no proprietary sample here, no Masterestaurant survey. What Diego F. Parra and the team contribute is the reading: which decision each figure triggers, what healthy range fits your size, and where the public number stops applying to a Latin American operator working against a delivery GMV of US$32.42 billion, per Grand View Research.

SIDE-BY-SIDE COMPARISON

Side-by-side comparison

	COMMON MISTAKE (WHAT THE OPERATOR MEASURES)	RIGHT METHOD (WHAT THE PUBLIC DATA SAYS)
Visit frequency	✕ Estimated by feel, or reported as total covers, never split between member and non-member	✓ Loyalty members visit 40%+ more often than non-members (Paytronix Loyalty Trends Report, 2024); against digital-only guests, twice as often, 2x (LoyaltyPass, 2026)
Spend per order	✕ Global average ticket compared month over month, with any lift credited to the menu	✓ Repeat guests spend 67% more per order than first-timers (Restroworks, 2025), and loyalty members spend 38% more per visit than walk-ins (Paytronix, 2025)
Marketing budget	✕ Opening-level spend held indefinitely, somewhere between 8% and 10% of sales	✓ Up to 10% of sales only while the restaurant is new; 3% to 6% once established (Toast, 2025)
Discovery channel	✕ Search ads bought to reach a young audience that no longer starts there	✓ 67% of Gen Z picks where to eat based on social media, and 41% uses TikTok to discover restaurants (TouchBistro Diner Trends, 2025; Restroworks, 2025)

	COMMON MISTAKE (WHAT THE OPERATOR MEASURES)	RIGHT METHOD (WHAT THE PUBLIC DATA SAYS)
Listing and online reputation	✕ Google listing with 8 photos uploaded at launch and never refreshed	✓ Listings with more than 100 photos get 520% more calls and 2,717% more direction requests (Restroworks, 2025; The Media Captain, 2025)
Repeat base outside the dining room	✕ Delivery treated as loose revenue, with no guest data and no second contact	✓ 47% of adults order takeout every week (National Restaurant Association, 2025) on a Latin American GMV of US$32.42 billion (Grand View Research, 2025)
Creator cost per collaboration	✕ The biggest affordable creator, hired once, measured by reach	✓ Average spend per collaboration was US$202 in 2025 (Collabstr, 2025), inside a U.S. market of US$10.52 billion growing 23.7% (Socially Powerful, 2025)

Finding 1 — The Bogotá dashboard: 4,100 sign-ups, zero pesos tracked

A points program with 4,100 sign-ups and no attributed-sales report is not loyalty, it is an expensive database. An owner in Bogotá showed me that dashboard in May, two years after opening, with 9.2% of quarterly sales spent on paid media while the healthy budget for an established restaurant runs 3% to 6% according to Toast (2025), and only a newly opened venue justifies reaching 10%. Sign-ups measure themselves because the POS counts them the moment it captures an email; repeat purchase has to be hunted down by matching the customer identifier against twelve months of tickets, and nobody does that by default. Meanwhile, Paytronix (2024) reports that 81% of U.S. loyalty members buy more frequently than non-members. The figure exists. The operator simply does not know whether it applies to him. Every repeat visit is worth 1.67 acquisition tickets, and that number reorders the entire budget.

Finding 2 — What is a repeat visit actually worth?

The arithmetic comes from Restroworks (2025):

existing customers spend on average 67% more per order than first-timers, so your effective acquisition cost gets divided by the number of visits you achieve in the year, not by the number of emails you captured. An operator who moves a customer from two to five annual visits did not improve loyalty by 150% in the abstract: he made his marketing cheaper by that same proportion, because the same media peso now buys five tickets instead of two, with tickets 67% fatter on top. Paytronix (2025) measures that fattening separately: 38% more spend per visit versus the walk-in guest. Run the math on last year's own sales before approving the next campaign. A 15% discount on your signature dish bleeds contribution margin precisely on the product that leaves the pass most often, whereas a frequency reward buys the habit without touching list price.

Finding 3 — The flat discount bleeds margin exactly where turnover is highest

Think it through with the optimal food cost the National Restaurant Association places between 28% and 35%: if the dish costs you 32 and you shave 15 points off the price, you did not lose 15% of profit, you lost close to half that dish's gross margin, and you lost it on the customer who was going to buy it anyway. Fourth visit free, a

Tuesday reservation with dessert included, the second coffee: those incentives only pay when behavior changes. Paytronix (2024) documents that loyalty members visit more than 40% more often. That differential is what you are buying, not the customer's affection. This work synthesizes public data from Paytronix, Restroworks, Toast, the National Restaurant Association, TouchBistro, LoyaltyPass and Grand View Research published between 2024 and 2026, organized by operating segment —fast casual, full service and QSR— crossed with size of one venue, three to ten, and multi-unit.

Finding 4 — What this analysis measures and what it cannot measure

There is no proprietary sample here and no Masterestaurant survey, and saying so matters: what Diego F. Parra and the team contribute is the READING, meaning which decision each figure triggers and what healthy range you should land in given your size. Where public data stops applying matters just as much. Almost all these measurements are American, and the Latin American operator works with a delivery market that Grand View Research values at US$32.420 billion in GMV for 2025, with a commission structure and a price elasticity none of those sources contemplates. Identify the customer on the ticket first, design the reward second, never the other way around, and the reverse order is the mistake that repeats most in independent restaurant loyalty programs. An enthusiastic operator launches the stamp card, hands out 4,100 sign-ups and only then discovers his POS does not tie the email to the transaction, which leaves him with the program's cost and no numerator to calculate it against.

Finding 5 — The sequencing error: customer data first, reward second

Without that link you cannot answer the one question that counts: what share of your sales comes from people who already know you. LoyaltyPass (2026) reports that loyalty members visit twice as often as digital-only customers, a 2x differential that collapses to nothing if you cannot separate one group from the other inside your own system. Verify the link this week. It costs one call to your POS vendor. Suppose your repeat customers stop returning and you have to replace those sales by buying new traffic. With the 67% additional spend Restroworks (2025) attributes to the regular, replacing a hundred repeat visits demands 167 first-timer visits to match the cash, and each of those 167 is paid at full acquisition price. An established restaurant spending 4% of sales on marketing, inside Toast's 3% to 6% range (2025), jumps to the 10% Toast reserves for openings and still falls short.

Finding 6 — What happens if your regulars stop coming back next year?

That is where loyalty stops being a marketing initiative and becomes a cash-flow defense, and Inc. identifies cash flow as the leading cause of financial stress and closure in small businesses.

Here is the trade of the craft: the program that looks like soft spending is the only policy you hold against the hard kind. Social media solves discovery and does not solve repeat purchase, and confusing the two functions is what inflates budgets without moving the till. TouchBistro (2025) measures that 67% of Gen Z decides where to eat through social media, and Restroworks (2025) that 41% uses TikTok to find restaurants; that traffic arrives, orders once and leaves, unless something captures it. On the spending side, Socially Powerful reports US$10.520 billion in U.S. influencer marketing during 2025, a jump of 23.7%, with an average cost per collaboration of US$202 according to Collabstr.

Finding 7 — Social media brings the first-timer, the program keeps him

Paying those US$202 to land a first-timer who never returns is buying half the business. Tie every discovery campaign to a capture mechanism —email, phone, POS identifier— and measure the second visit, not the reach. The healthy range for member share of sales shifts with size, and Paytronix (2024) documents that top operators reach 37% of transactions through loyalty members. For a single venue, aiming at 15% or 20% of identified transactions in the first year is already a serious result, because your customer universe is the neighborhood and natural frequency sets the ceiling. Between three and ten venues the technical link becomes the bottleneck rather than the incentive: you need a unique identifier that travels across locations, and without it the same customer shows up as three different people. In multi-unit, Paytronix's 37% is reachable because volume allows segmenting and testing. One context figure that calibrates ambition: the National Restaurant Association (2025) reports that 47% of adults order takeout every week.

Finding 8 — Healthy ranges by size: one venue, three to ten, multi-unit

The frequency is there. Capturing it is the work. The first difference is arithmetic, and almost nobody runs it. If a repeat guest spends 67% more per order than a first-timer (Restroworks, 2025), each returning visit is worth 1.67 acquisition tickets, and your effective customer acquisition cost divides by the number of yearly visits you win. An operator who moves a guest from 2 to 5 visits per year did not improve loyalty by 150%: he cut his marketing cost by the same proportion. That calculation reorders the budget, not the sign-up rate. The second is incentive design. A flat 15% off the flagship dish destroys contribution margin exactly where volume lives, while a frequency reward —the fourth visit, the Tuesday reservation— buys the habit without touching list price. Paytronix data (2025) shows members already spend 38% more per visit than walk-ins; discounting for someone who was going to spend more is paying for behavior you already had.

Finding 9 — Three differences between a loyalty program and real customer loyalty

The third difference is channel ownership. The National Restaurant Association (2025) reports 47% of adults order takeout weekly, and in Latin America that habit sits on a GMV of US$32.42 billion (Grand View Research, 2025); if all that volume runs through a platform that keeps the guest record, you are renting your own repeat base. Converting delivery into direct orders, with your own name and phone number, is the asset that separates a restaurant with real growth from one that merely bills.

POINT BY POINT

Segment analysis: where each operator lands according to the sources

SINGLE LOCATION, FAST CASUAL

A · COMMON MISTAKE (WHAT THE OPERATOR MEASURES)

Sign-up program with a flat discount; marketing held near 10% of sales two years after opening

B · MASTERESTAURANT Frequency reward, marketing inside the 3% to 6% band (Toast, 2025) and identity capture on every check

Verdict: Healthy range: 30% to 45% repeat revenue. With repeat guests spending 67% more per order (Restroworks, 2025), every point of recurrence earned outpays a point of new paid media.

GROUP OF 3 TO 10 LOCATIONS, FULL SERVICE

A · COMMON MISTAKE (WHAT THE OPERATOR MEASURES)

Each location runs its own promotion, with no consolidated cross-site repeat report

B · MASTERESTAURANT One guest identity across sites and a weekly repeat-share report per location

Verdict: The multiplier lives in cross-site frequency: members visit 40%+ more often (Paytronix, 2024), and in multi-site operations that frequency spreads across locations only when the program is single.

MULTI-UNIT, HIGH-TRAFFIC QSR

A · COMMON MISTAKE (WHAT THE OPERATOR MEASURES)

Volume surrendered to delivery platforms, with the guest record held by the aggregator

B · MASTERESTAURANT Direct ordering with a house incentive and a second contact against the captured base

Verdict: Against digital-only guests, members visit twice as often (LoyaltyPass, 2026). With 47% of adults ordering takeout weekly (NRA, 2025), whoever skips data capture rents his own unit economics.

ANY SIZE · DISCOVERY AND ONLINE REPUTATION

A · COMMON MISTAKE (WHAT THE OPERATOR MEASURES)

Google listing under 10 photos, unanswered reviews, social used only for promotions

B · MASTERESTAURANT More than 100 photos, review responses within 48 hours, craft-driven video content

Verdict: The jump is disproportionate: 520% more calls and 2,717% more direction requests once past 100 photos (Restroworks, 2025; The Media Captain, 2025). Cheapest investment on this table.

ANY SIZE · CREATOR INVESTMENT

A · COMMON MISTAKE (WHAT THE OPERATOR MEASURES)

One large, single collaboration with the widest-reach creator available

B · MASTERESTAURANT A series of small, repeated collaborations measured by repeat visits instead of reach

Verdict: At US$202 average spend per collaboration (Collabstr, 2025) inside a US$10.52 billion market growing 23.7% (Socially Powerful, 2025), cheap repetition beats the one-off splash.

SIDE-BY-SIDE COMPARISON

What the average operator does with customer loyalty MEASURED MISTAKE

- ✕ Counts points-program sign-ups and calls that retention and repeat purchase
- ✕ Hands out a flat percentage discount that eats the contribution margin of the fastest-moving dish
- ✕ Keeps opening-level marketing spend, near 10% of sales, three years after launch
- ✕ Posts only promotions, while 67% of Gen Z decides where to eat through that same channel
- ✕ Leaves the Google listing under 10 photos with reviews unanswered
- ✕ Hands delivery guests to the platform without capturing a single contact detail

What the operator who actually grows does MASTERESTAURANT

- ✓ Measures the share of monthly sales coming from identified guests who had already visited
- ✓ Rewards FREQUENCY —the fourth visit, the slow Tuesday— instead of cutting list price
- ✓ Steps down to the 3% to 6% band once the repeat base carries the break-even point
- ✓ Produces craft-driven video —kitchen, product, people— and treats promotion as the exception
- ✓ Uploads fresh photos weekly past the 100 mark and answers every review within 48 hours
- ✓ Turns platform guests into house guests with direct ordering, WhatsApp and a reason to return

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THE NUMBERS THAT MATTER

2026 customer loyalty scorecard: six figures that govern repeat purchase

81%

of U.S. loyalty members buy more frequently than non-members

67 %

more spent per order by repeat guests versus first-timers

38 %

more spent per visit by loyalty members versus walk-in guests

67 %

of Gen Z decides where to eat based on social media

47 %

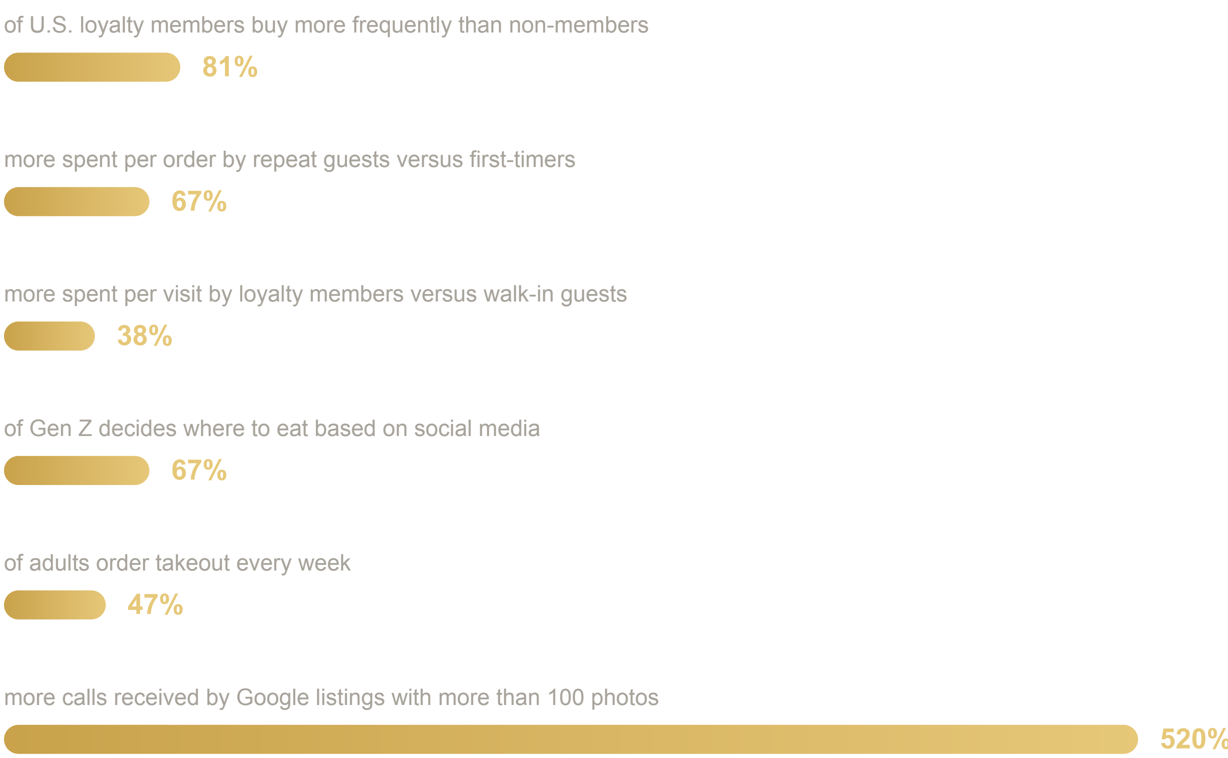
of adults order takeout every week

520 %

more calls received by Google listings with more than 100 photos

VISUALIZATION

The numbers, visualized



Sources: Paytronix — Annual Loyalty Report 2024 · Restroworks — Restaurant Customer Retention Statistics 2025 · Paytronix — Effectiveness of Loyalty Programs 2025 · TouchBistro 2025 Diner Trends Report · National Restaurant Association 2025

Chart by masterestaurant.com

REAL CASE

"We arrived with 9.2% of sales going to paid media and a program of 4,100 sign-ups nobody could tie to revenue. We killed the flat discount, put a reward on the fourth visit, went from 11 to 140 photos on the Google listing in eleven weeks and started asking for a phone number on every delivery handoff. Marketing spend dropped to 5.4% of sales, and sales from identified guests who had already visited moved from 19% to 34% of the total in the following quarter. Their ticket was always higher; what we lacked was the report to see it."

— Owner of a three-location fast casual in Bogotá, working with Masterestaurant (2026)

HOW TO APPLY IT IN YOUR RESTAURANT

How to place yourself: four steps from sign-ups to recurring revenue

1. **Step 1 · Measure your repeat revenue share before touching anything**
Pull from the POS, for the last 90 days, what percentage of sales came from identified guests who had bought before. That figure, not the sign-up count, is your baseline. If your single-location fast casual sits under 20%, the program is not the problem: nobody captures identity at the register. Against the Paytronix (2024) reference, where 81% of members buy more frequently, a living program should push that share above 30% within six months.

2. **Step 2 · Swap discount for frequency and protect contribution margin**
Remove any flat discount on your highest-volume dish and replace it with a reward on visit number four, or a benefit on the slow weekday. Menu engineering rules here: the food cost of the rewarded dish must stay inside the 28% to 35% range the National Restaurant Association documents, and never above the 32% ceiling Masterestaurant sets. Remember members already spend 38% more per visit (Paytronix, 2025); you are buying frequency, not ticket.

3. **Step 3 · Take back discovery and the listing**
Upload fresh photos weekly until you pass 100 on your Google listing —the threshold where Restroworks (2025) documents 520% more calls and The Media Captain (2025) reports 2,717% more direction requests— and produce craft video for Reels and TikTok, because 67% of Gen Z decides where to eat through social and 41% searches restaurants directly on TikTok (TouchBistro, 2025; Restroworks, 2025). Promotion is the exception; product and people are the rule.

4

Step 4 · Convert platform delivery into a house base

Put a reason to order direct inside every package and capture the phone number with explicit consent. With 47% of adults ordering takeout weekly (National Restaurant Association, 2025) on a Latin American GMV of US$32.42 billion (Grand View Research, 2025), every month without capture is a base given away. Then fix the budget: if you are established, step down from the 10% ceiling to the 3% to 6% band Toast recommends (2025), and reinvest the gap into break-even.

FAQ

Frequently asked questions about restaurant customer loyalty

What share of my sales should come from repeat guests?

It depends on the segment. A healthy single-location fast casual usually runs 30% to 45% of sales from repeat guests; a destination full service can live with less, and a high-traffic QSR should sit above. The useful reference is Paytronix (2024): 81% of loyalty members buy more frequently than non-members.

How much should I spend on marketing to build loyalty without breaking cash?

Toast (2025) documents up to 10% of sales while the restaurant is new, and a 3% to 6% band once established. If your repeat base already carries the break-even point and you are still at 9%, you are paying acquisition for people who already know you. Step into the range and reinvest the gap in product and content.

Is a points program better than a straight discount?

Frequency rewards win almost every time. A flat discount cuts contribution margin exactly on the fastest-moving dish, while loyalty members already spend 38% more per visit than walk-ins, per Paytronix (2025). You want to buy visit number four, not to shave the first one that was going to happen anyway.

Is TikTok or Reels worth it for retention and repeat purchase?

For younger guests, yes, and with data behind it: 67% of Gen Z decides where to eat based on social media and 41% searches restaurants on TikTok (TouchBistro, 2025; Restroworks, 2025). Average spend per creator collaboration was US$202 in 2025 according to Collabstr, so testing is cheap. Measure repeat visits, not views.

DATA & SOURCES

Sector data 2026 (official sources)

Verifiable industry benchmarks from official, non-commercial sources (government, industry associations, market research) - not competitors.

Metric	Benchmark 2026	Source
Gen Z que decide dónde comer por redes sociales	**67% (2025)**	TouchBistro Diner Trends 2025 (vía Tablein)
Gen Z que lee reseñas de restaurantes en Instagram	**55% (2025)**	TouchBistro Diner Trends 2025 (vía Tablein)
Operadores de restaurantes en TikTok	**48% en 2025 (26% en 2023)**	TouchBistro State of Restaurants 2025 (vía Tablein)
Importancia de responder comentarios en redes	**43% de los comensales lo considera muy importante (2024)**	Toast 2024 (vía Tablein)
Comensales que evitarían un restaurante por críticas en redes	**25% (2025)**	TouchBistro Diner Trends 2025 (vía Tablein)
Redes sociales útiles para descubrir nuevos alimentos	**74% de los comensales (2025)**	National Restaurant Association SOI 2025 (vía Tablein)

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